

FRESNO, CALIFORNIA
CLASS SPECIFICATION
RETIREMENT BENEFITS MANAGER

FLSA STATUS:

Exempt

CLASS SUMMARY:

The Retirement Benefits Manager is the first level in a three level Retirement Management series. Incumbents manage the Benefits Administration Division and supervise staff and activities related to retirement counseling and disability retirement. Incumbents may recommend policies, develop and revise procedures and acts as a liaison with actuaries, City departments, and employee organizations.

The Retirement Benefits Manager is distinguished from the Assistant Retirement Administrator, which is responsible for maintaining the retirement investment portfolios and may serve in the absence of the Retirement Administrator,

Deleted: managing benefit services to active employees and retired members of the retirement systems.

TYPICAL CLASS ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)

**FRE-
QUENCY**

- | | |
|----|--|
| 1. | Supervises employees including prioritizing and assigning work; conducting performance evaluations; ensuring staff are trained; ensuring employees follow policies and procedures; maintaining a healthy and safe working environment; and, making hiring and disciplinary recommendations. |
| 2. | Manages the daily operations of the Benefits Administration division within the Retirement Office, which includes: planning, coordinating, administering, evaluating, and recommending projects, processes, procedures, systems, and standards; developing and coordinating work plans; participating in the development of goals and objectives; and, ensuring compliance with applicable Federal, State, and Local laws, regulations, codes, and/or standards. |
| 3. | Administers the automated pension administration software package, including assigning user access, designing additional modules, and determining appropriate timing for the download of contribution information from the City's payroll system. |
| 4. | Supervises the retirement payroll <u>and disability</u> process, including determining and maintaining internal controls on access to documents, supervising the production of payroll, scheduling transmissions of ACH files, developing schedules for the delivery of annual employee contribution and DROP statements, and authorizing payment of contribution withdrawals and other disbursements. |

Daily
10%

Daily
~~15~~%

Deleted: 20

Daily
~~10~~%

Deleted: 5

Daily
~~20~~%

Deleted: 1

FRESNO, CALIFORNIA
CLASS SPECIFICATION
RETIREMENT BENEFITS MANAGER

TYPICAL CLASS ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)		FRE- QUENCY
5.	Monitors new legislation for its impact on the retirement systems, including analyzing potential impacts and making recommendations of positions based on perceived impact, and referring items to the Retirement Administrator or the Board Counsel for review.	Daily 10%
6.	Coordinates financial activities with accounting functions, including authorizing payables for benefit expenses, reviewing CAFR presentation and audit work papers, coordinating independent audits of retirement systems with outside auditors, scheduling audits, and performing related activities.	Daily 5%
7.	Prepares, reviews, interprets, and analyzes a variety of information, data, and reports; makes recommendations based on findings; communicates pertinent information to internal and external parties.	Weekly 5%
8.	Assists in forecasting, preparing, and administering division budget, which may include capital improvement budgets; prepares cost estimates for budget recommendations; submits justifications for budget items; monitors and controls expenditures.	Monthly 5%
9.	Participates in a variety of meetings, committees, and/or other related groups to receive and convey information.	Monthly 5%
10.	Oversees actuarial valuations and experience studies, including coordinating the extraction of data from automated systems for outside actuarial review, informing actuaries of changes in benefits which impact assumptions, responding to questions from actuaries regarding valuations and experience studies, and performing related activities.	Annually 5%
11.	Receives and responds to questions and more serious complaints from the retirees and/or other agencies regarding issues, problems, and/or other applicable areas of concern within the division; evaluates situations and recommends solutions; coordinates work with other sections, divisions, and/or departments and outside agencies as needed.	Occasion- ally 5%
12.	Manages and participates in special projects and research assignments as assigned.	Occasion- ally 5%
13.	Performs other duties of a similar nature or level.	As Required

FRESNO, CALIFORNIA
CLASS SPECIFICATION
RETIREMENT BENEFITS MANAGER

Training and Experience (positions in this class typically require):

- Bachelor's degree in Human Resources, Business Administration, Public Administration, or a related field and three years of supervisory experience in the administration of a retirement or government benefit program;

OR

- An equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Licensing Requirements (positions in this class typically require):

Some positions, based on assignment, may require:

- Valid State of California Driver's License, Class C.

Knowledge (position requirements at entry):

Knowledge of:

- Management and supervisory principles and practices;
- Budget administration principles and practices;
- Financial management principles and practices;
- Negotiation and mediation techniques;
- Public administration principles;
- Applicable Federal, State and Local laws, codes, ordinances, policies, procedures, rules and regulations;
- Advanced retirement benefit administration principles and practices;
- Data processing systems;
- Project management principles and practices.

FRESNO, CALIFORNIA
CLASS SPECIFICATION
RETIREMENT BENEFITS MANAGER

Skills (position requirements at entry):

Skill in:

- Monitoring and evaluating employees;
- Prioritizing and assigning work;
- Using a computer and related software applications;
- Managing division operations;
- Managing multiple priorities simultaneously;
- Analyzing and developing policies and procedures;
- Interpreting, applying, and explaining applicable laws, codes, ordinances, policies, procedures, rules and regulations;
- Analyzing problems, identifying alternative solutions, projecting consequences of proposed actions, and implementing recommendations in support of goals;
- Analyzing, interpreting, and understanding technical and statistical information;
- Conducting negotiations and mediations;
- Preparing and giving presentations;
- Speaking in public;
- Preparing clear, concise, and comprehensive reports, records, correspondence, and other written materials;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to give and/or receive work direction.

Physical Requirements:

Positions in this class typically require: feeling, finger dexterity, grasping, hearing, repetitive motions, seeing and talking.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to life, carry, push, pull or otherwise move objects including one's own body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met. Some positions may require more frequent walking, lifting and standing.

Note:

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

Classification History:

Draft prepared by Fox Lawson & Associates (LM)
Date: 12/2007